BTEC Bulletin

News from the Business Transformation Executive Committee

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Performance Management

The Performance Management Working Group presented recommendations to the BTEC to enhance the effectiveness, efficiency and integrity of performance management in the Agency. The group recommended improvements in the following areas:

- GS and FS annual evaluation forms (AEF) and procedures;
- Performance awards;
- FS skills matrix, promotion precepts and career development;
- Performance management training for supervisors;
- Accountability for performance management responsibilities.

The BTEC endorsed streamlined FS and GS AEF forms and other recommendations of working group. The Office of Human Resources will now begin negotiations with the American Federation of Government Employees and the American Foreign Service Association.

Priority Phoenix Reports

At the September meeting, the BTEC endorsed three priority Phoenix reports for completion within 60 days.

A Bureau Transition Coordinators (BTC) working group was tasked with developing a prioritized list of reports needed from Phoenix. The group developed a listing of new requirements, as well as reports needing enhancements. They recommended that the following reports be given the highest priority:

- Obligations by Contract;
- Obligations by Fiscal Year;
- Pipeline by Managing Bureau/Office.

The Phoenix Reports Team is working with a sub-group of BTC members to define the specific requirements and develop the reports.

Guidelines for Delegation of Grant Authority

The BTEC approved guidelines for delegating the authority to award and administer grant agreements to Washington bureaus and mission technical or program officials.

The BTEC Procurement Working Group recommended the following guidelines:

- The assistance program is an established program that is expected to continue.

Organizational Approach for Procurement and Finance

The BTEC endorsed a combination of a sub-regional and mission-based model (hybrid) as the organizational approach for the procurement and finance personnel in the field.

A Business Systems Modernization Team (BSM) analyzed four potential models for the procurement and finance staff -- regional, sub-regional, mission-based and hybrid.

- Regional - One hub in each region with a number of contracting officers (COs) or controllers.
- Sub-regional - More than one hub within each region with one or more COs or controllers.
- Mission-based - One or more COs and one controller per mission.
- Hybrid - A combination of these scenarios.

The BSM team analysis indicated that using a sub-regional model to the extent possible would result in efficiencies in the finance and procurement function. It would balance the procurement workload, increase knowledge sharing through centralized expertise and improve training of new COs in managing complex actions. In finance, it will enable missions to focus on analysis and decision-making by reducing the transaction-processing burden. The mission-based model may be needed at some larger missions with complex programs.

A working group of BTEC members was formed to identify potential sites. The organizational realignments will be implemented in parallel with the roll-out of Phoenix and a new procurement system. The roll-out schedule is pending funding decisions and an assessment of the feasibility of integrating the USAID and Department of State systems.

Your comments and suggestions are welcomed. Please contact your bureau's BTEC member, the PMO Project Manager Bernie Mazer, or online at http://inside.usaid.gov/BTEC/

Did you know…

……….That the Office of Procurement issued 445 new assistance agreements in FY 2002? This figure does not include assistance agreements that were awarded in the field missions.

✔ **A BTEC off-site is scheduled for November 14.**

Guidelines for Delegation of Grant Authority (cont.)

- The organization has sufficient qualified staff and the responsibilities are documented in position descriptions.
- The individual(s) receive a warrant from the Office of Procurement (M/OP) based on completion of specific training.
- The transfer of authority is acknowledged by a memorandum of understanding signed by the head of the receiving organization and the Assistant Administrator for Management.
- The delegation will be for a reasonable dollar amount based on the needs of the office/bureau.
- The M/OP evaluation staff will conduct an evaluation of the process in six months and a year.

The delegation will be provided on a voluntary basis. M/OP will determine whether the unit has met all requirements.

Update on Quick Hits

Of the original nine quick hit projects, six have been completed, two are scheduled for completion in December, and one is on hold pending a government-wide solution.

Quick Hit	Status
Streamlined Recruitment (AVUE)	*Completed*
Staffing Pattern System (E-World)	*December*
IQC Standardization	*Completed*
Recovery of Unneeded Funds	*December*
E-Procurement (Ariba Buyer)	*Completed*
Paperless Metrochek	*Completed*
Reduced Reporting Requirements	*Completed*
Proceeds from Mission Property Sales	*Completed*
Internet Travel Booking Tool	*On-hold*

Many of the quick hits require follow-on actions or monitoring to ensure that the benefits are fully realized. For example, the Ariba buyer electronic procurement tool was a very successful pilot and now awaits funding decisions for implementation Agency-wide. The AVUE recruitment tool is now being used for Agency recruitment actions. The Office of Human Resources is monitoring the process to ensure that the system continues to deliver effective results.